By-Sherman, C. Neil; and Others

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Information Service Centers. Final Report.

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This one-year project produced several publications and an evaluative investigation, all having to do with the rapidly growing community of educational information centers. Over 1500 such centers were surveyed by questionnaire to determine their locations, sizes, activities, and holdings. A directory which lists and describes some four hundred centers was compiled and will be published by the U.S. Office of Education. Survey data and visits to selected centers were used to prepare an article for publication in "American Education." Two other products of the project, "ERIC Can Help" and "How to Use ERIC," are brochures that provide brief descriptions of ERIC, its users, publications, and services. The project also produced an introductory manual for use by personnel involved in the planning and operation of educational information centers. This manual was used as a text at the OE-sponsored institutes conducted during the summer of 1968 for the training of center personnel. A revised edition entitled "The Educational Information Center: An Introduction" will be available by mid-July, 1969. The project team attended the summer training institutes and, as the result of interviews with staffs and attendees and classroom observation, made recommendations for future institutes. Appended are selected statistics from the questionnaires. (Author/JB)



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AN INVESTIGATION, ANALYSIS, AND EVALUATION OF ACTIVITIES CONNECTED WITH THE OPERATION OF EDUCATIONAL INFORMATION SERVICE CENTERS – FINAL REPORT



11 APRIL 1969

ZOOTE

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE OFFICE OF EDUCATION

TM-WD-1340

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TECHNICAL MEMORANDUM

(TM Series)

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FINAL REPORT--An Investigation, Analysis, and Evaluation of Activities Connected with the Operation of Educational Information Service Centers

bу

C. Neil Sherman*
E. Raymond Lewis*
Judith Wanger *
 Ann Luke
Lynn Catoe

11 April 1969

SYSTEM

DEVELOPMENT

CORPORATION

5720 COLUMBIA PIKE

FALLS CHURCH

VIRGINIA

22041

*Principal Investigators

The Research reported herein was performed pursuant to a contract with the Office of Education, U.S. Department of Health, Education, and Welfare. Contractors undertaking such projects under Government sponsorship are encouraged to express freely their professional judgment in the conduct of the project. Points of view or opinions stated do not, therefore, necessarily represent official Office of Education position or policy.

WASHINGTON OPERATIONS CENTER

CORPORATE OFFICES: Santa Monica, California



FINAL REPORT

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C. Neil Sherman*
E. Raymond Lewis*
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System Development Corporation 5720 Columbia Pike Falls Church, Virginia 22041

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^{*}Principal Investigators

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We are also grateful to the staff of over 1500 agencies who responded to our questionnaire and provided us with the necessary information to compile the Directory of Educational Information Centers. The directors (Ivan Kaldor, Kent State University, Kent, Ohio; Lorraine Mathies, University of California at Los Angeles, Los Angeles, California; and E. Venable Lawson, Emory University, Atlanta, Georgia) and staff of the 1968 summer OE-sponsored institutes kindly extended us their hospitality and assistance throughout the institutes. They and the attendees were particularly helpful in making recommendations for our product, The Educational Information Center: An Introduction.

We would also like to express our gratitude to the many individuals in OE who were helpful to us on many occasions. In particular, we would thank Lee G. Burchinal, Director of the Division of Information and Technology; F.K. Cylke, Acting Chief, Library and Information Sciences Research Branch, Bureau of Research; and Harvey Marron, Chief of Central ERIC, and his staff.



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SUMMARY

This one-year project, conducted by System Development Corporation for the U.S. Office of Education, produced several publications and an evaluative investigation, all having to do with the rapidly growing community of educational information centers. Over 1500 such centers were surveyed by questionnaire to determine their locations, sizes, activities, and holdings. From this survey, a directory was compiled listing and briefly describing some four hundred centers involved in the provision and dissemination of educational information. This directory is to be published by the U.S. Office of Education. Survey data were also used, as were the findings of visits to selected centers, to prepare an article on the educational information center for publication in American Education. other products of the project, "ERIC Can Help" and "How to Use ERIC," are brochures that provide brief descriptions of ERIC, its users, publications, and services. Both were published by OE and are available from the Government Printing Office. The project also produced an introductory manual for use by personnel involved in the planning and operation of educational information centers. manual was used as a text at the OE-sponsored institutes conducted during the summer of 1968 for the training of center personnel. A revised edition entitled The Educational Information Center: An Introduction is being published by Tinnon-Brown of Los Angeles, California, and will be available by mid-July, 1969. The SDC project team attended the summer training institutes and, as the result of interviews with both instructional staffs and attendees, classroom observation, and meetings with institute directors, made several recommendations for future institutes.



INTRODUCTION

This project was a multi-phased effort consisting of both investigational and production activities. It was funded by the U.S. Office of Education to (1) examine the rapidly growing community of centers devoted to providing educational information services, (2) provide guidelines for training and educating personnel involved in the operation of such centers, and (3) produce textual and introductory materials relevant to these centers. Its principal products were The Educational Information Center: An Introduction, the Directory of Educational Information Centers, and an evaluation of OE-sponsored institutes for educational information center personnel. Other products included two introductory brochures on ERIC (Educational Resources Information Center) and an article for the OE journal, American Education. The project was originally scheduled to run a year from February 12, 1968, to February 11, 1969; it was extended two months to April 11, 1969, due to a delay in securing Bureau of the Budget approval for the questionnaire.

In the following sections the project has been divided into its principal components or tasks:

- I. Preparation of ERIC Brochures
- II. Visits to Centers
- III. Preparation of Publicity Releases
- IV. Article for American Education
- V. Compilation of the Directory of Educational Information Centers
- VI. The Educational Information Center: An Introduction
- VII. Institute Evaluation

I. PREPARATION OF ERIC BROCHURES

Two brochures were prepared to serve as introductory material to ERIC for educational information center personnel and for the general educator-user population. Work on these began at the outset of the project and was completed by May 1968. Both brochures were available at the summer institutes for use in introducing ERIC.

The smaller brochure, "ERIC Can Help," was prepared in a folded, six-panel format. It describes briefly the general types of users, publications, and purposes of ERIC. The copy and layout design for this brochure were delivered to OE at the beginning of April, 1968. The second brochure, "How to Use



ERIC," is a staple-bound 12-page booklet which describes the ERIC network more comprehensively and explains how to use ERIC reference tools and how to secure documents from ERIC. Copy and layout for this brochure were delivered in May, 1968.

II. VISITS TO CENTERS

In order to establish a practical framework for the development of a manual on the role and operation of the educational information service centers, the SDC team visited ten centers selected by the Director of OE's Division of Information Technology and Dissemination. The team sought reactions to the manual outline, observed operating procedures and discussed them with center personnel, and collected samples of literature, such as brochures and forms, produced by the centers. Center personnel also provided many valuable insights into the role of the educational information center within the education community and the problems that are being encountered. During this tour, the SDC team also visited two OE Regional Offices and two State Departments of Education for purposes of coordination and information. The itinerary of visits was as follows:

Centers	Person Visited	Date
Far West Laboratory for Educa- tional Research and Development Berkeley, California	Dr. Paul Hood	Mar 28, 1968
Educational Planning Center Contra Costa County Department of Education 75 Santa Barbara Road Pleasant Hill, California	James Nelson, Director	Mar 29
Northern San Joaquin Valley Counties Supplementary Education Center 33 E. Magnolia Center Stockton, California	Dr. H. Duncan Sprague,	Apr 1
USOE Regional Office Region IX San Francisco, California	Dr. Walter Hirsch	Apr 2



(Center)	(Person Visited)	(Date)
USOE Regional Office Region II New York City, New York	Dr. John Sokol, Director Educational Research	Apr 2
Research and Information Service for Education 444 S. Gulph Road King of Prussia, Pa.	Dr. Lester Mann Asst. Superintendent of Schools Montgomery County, Pa. and Director of the Project	Apr 3
Westchester Regional Education Center 35 Orchard Street White Plains, New York	Joseph J. Blaney, Director	Apr 4
State Department of Education Center for Innovation in Education The University of the State of New York Albany, New York	Werner Jacobsen, Consultant	Apr 8
Genesee Valley School Development Association (Genesee Valley Regional Education Center) 100 Allens Creek Road Rochester, New York	Dr. Byran Williams, Director	Apr 10
Michigan-Ohio Regional Education Laboratory 3750 Woodward Avenue Detroit, Michigan	Dr. Stuart C. Rankin, Executive Director	Apr 16
Michigan State Department of Education, Board of Water and Light Building Lansing, Michigan	Dr. Donald Goodson, Title III ESEA Consultant	Apr 17
ASSIST Center Wayne County Intermediate School District 33030 Van Born Road Wayne, Michigan	Samuel Mangione, Director	Apr 18



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11 April 1969

TM-WD-1340

(Center)

(Person Visited)

(Date)

Central Midwestern Regional Education Laboratory 10646 St. Charles Rock Road Saint Ann, Missouri Beldin Hare Apr 22, 1968

III. PREPARATION OF PUBLICITY RELEASES

Based on information obtained during the visits to these centers, the SDC Public Information Office prepared news releases of about four hundred words each on three centers: ASSIST (Wayne County, Michigan); RISE (King of Prussia, Pennsylvania); and Contra Costa County (Pleasant Hill, California). These were forwarded to the centers for final review and returned with comments, suggestions, and changes. Corrected and rewritten, the releases, together with photographs taken at the centers, were submitted to OE on June 18, 1968, for distribution to the news media.

IV. ARTICLE FOR AMERICAN EDUCATION

An article was prepared for publication in <u>American Education</u>, OE's official journal. The article describes the network of educational information centers and some of the more innovative information and dissemination services of the centers.

The SDC author submitted an outline to AE on May 24, 1968, and met with the Editor on June 6 to discuss the article. The manuscript was submitted on June 28. OE subsequently decided that the article should incorporate information gained throughout the project, particularly from the questionnaires to be distributed in connection with the compilation of the Directory. Inasmuch as the preparation of the Directory came to be delayed for several months, the AE article was also delayed; it was the final task to be completed in the project. The draft manuscript was resubmitted to OE on March 17, 1969; final copy was delivered on April 11.



V. COMPILATION OF THE DIRECTORY OF EDUCATIONAL INFORMATION CENTERS

A. Statement of the Problem and Schedules

SDC conducted a questionnaire survey of educational information service centers to ascertain their location, operational status, level of manning, organizational setting, services offered, and holdings. This information was used in compiling a directory of centers along the lines of the Directory of Special Libraries and Information Centers. The questionnaire survey was also to have provided background knowledge for the institute directors and for the manual preparation. (It was determined at a later date that the results of the survey would also be used for the American Education article.) The original schedule planned for the completion of both the survey and the Directory 18 weeks after the start of the contract. A delay in securing Bureau of the Budget approval for the quesionnaire required the survey to be rescheduled for early fall, with the first mailing of questionnaires on September 16. This change in schedule precluded the use of the questionnaires for anything but the Directory and the AE article during the course of the contract, both of which were delivered to OE on April 11, 1969.

B. questionnaire and Survey

The questionnaire was designed to ascertain the location, operational status, staffing and organization, holdings, and services of educational information centers. It was sent to a population of 1,916 Title III, ESEA centers drawn from the 1966, 1967 and 1968 Pacesetters in Education.* (Entries listed as planning grants were not contacted because the emphasis was to be placed on operational centers.) Questionnaires were also sent to the following agencies:

- 51** State Departments of Education
- Research Coordinating Units for Vocational Education
- 20 Regional Educational Laboratory
- 14 Instructional Materials Centers for Handicapped Children and Youth
 - 9 Research and Development Centers
 - 9 OE Regional Offices



^{*}There is some duplication in this list due to several centers having more than one grant number.

^{**} This includes Puerto Rico.

The questionnaire was distributed in three separate mailings; the second and third were intended as follow-ups to those who failed to respond to earlier contacts. The third mailing, in addition, included 340 centers which had not previously been contacted. These were centers newly funded during the period following the initial compilation of a mailing list. These centers received only one mailing. The dates of each mailing and the number of questionnaires sent in each were as follows:

QUESTIONNAIRES

1st mailing	1724
2nd mailing	844
3rd mailing	780 [*]

Questionnaire responses are broken down by class or type as follows:

AGENCY	NUMBER CONTACTED	NUMBER RESPONDED	PER CENT RESPONDED
Title III ESEA Projects	1916	1493	78
Regional Educational Laboratories	20	19	95
Instructional Materials Centers	14	14	100
Research & Development Centers	9	9	100
	51	44	86
State Departments of Education	45	36	80
Research Coordinating Units	9	9	100
OE Regional Offices	2064	1624	79

C. Directory Criteria, Format, and Entries

The first task in analyzing the questionnaire responses was to determine the criteria that would be used to select centers for inclusion in the Directory. After a preliminary screening of all responses and consultation with OE, the following criteria were decided upon:



^{*}Of these, 440 represented third follow-up mailings to the original population contacted, and 340 were new mailings to recently funded Title III (ESEA) centers.

- 1. The center, to be included, must provide at least one service (among those listed in paragraph III-B of the questionnaire) other than Advisory or Consulting, Translation, Reproduction and ADP:
- 2. must, in addition, have
 - (a) holdings of a least 1-1000 in any one of the three classes of holdings shown in section VI-A (Books, Periodical Titles, or Reports); or
 - (b) a significant ERIC collection, indicated in Section VI-B, by
 - (1) a standing order for ERIC materials, or
 - (2) possession of one complete collection (e.g., Selected Documents on the Disadvantaged), or
 - (3) purchase of individual reports plus possession of at least two indexes, or
 - (c) access to the materials specified in paragraphs (a) and (b) above, or to their equivalents.

Because of the lack of sufficient information or clear responses, it is possible that some centers that met these criteria were inadvertently excluded.

The final group of questionnaire respondents to be included in the $\underline{\text{Directory}}$ were divided into the following categories:

AGENCY	TOTAL NUMBER RESPONDED	TOTAL NUMBER SELECTED
Title III ESEA Projects	1493	317
Regional Educational Laboratories	19	7
Instructional Materials Centers	14	11
Research and Development Centers	9	3
State Departments of Education	44	13
Research Coordinating Units	36	31
OE Regional Offices	9	3
Others*		12

^{*}These include centers that do not fit the above categories or were brought to our attention by respondents to the questionnaires; e.g., School Research Information Service; Ohio Education Association; Illinois State instructional materials centers.



The questionnaires of those centers selected for inclusion in the <u>Directory</u> were tabulated in a few key areas and are presented in the Appendix. The results are summarized below for the largest group of entries, the Title III, ESEA educational information centers.*

(1) Services

Over one-half of the centers indicate that they prepare three or more publications. Newsletters, reports and current announcements are the most common publications prepared by the centers. Direct loan, reference, bibliography compilation, preparation of reviews, and reproduction are the most common services offered.

(2) Holdings

Over one half of the centers have collections of under 1000 volumes in each of the three categories (books, periodical titles, and research reports). A very few (less than 25) have a book collection of over 5000 volumes. A majority of the centers had at least some ERIC publications. Slightly less than one-half have reference volumes.

E. Final Clarification

The <u>Directory</u> entries for each center, typed in their final format, were sent to the centers with a copy of the introduction to the <u>Directory</u>. Corrections were made in entries for which the centers indicated needed changes. Each center was also asked to submit three subject heading terms that best represented the subject strengths of its collection.

F. Conclusions and Recommendations

The survey was a first effort to identify and locate the educational information centers. As such, it was more exploratory than definitive. The survey successfully accomplished this objective, but further refinement of the questionnaire could produce more precise information about each center. One example is in the breakdown of holdings from 1-1000. This category proved to be far too gross for educational information centers, whose holdings are relatively small.

SDC found a great deal of interest in the <u>Directory</u> as a potential source of information. SDC recommends that it be updated regularly to provide an ongoing source of information and to assist individual centers in establishing an identity within the educational information center community.



^{*}Over 56% of these 317 centers began operation in 1966 and 1967.

VI. THE EDUCATIONAL INFORMATION CENTER: AN INTRODUCTION

The Educational Information Center: An Introduction was developed to serve both as a reference manual for personnel involved in the planning and operation of educational information centers and as a text for the OE-sponsored training institutes held during the summer of 1968. The outline of the Introduction was prepared during the first month of the project, and the initial draft was submitted to OE for review on May 17, 1968. Comments and suggestions of OE personnel and outside readers were incorporated into the manual, and on July 3, 160 copies were delivered to OE for distribution to the directors of the then forthcoming summer institutes. Guide to the Reference Manual for Educational Information Service Centers was prepared to accompany this original version of the Introduction. This was a short document intended for use by individuals involved in conducting the institutes. Thirty copies of the Guide were delivered to OE on July 3.

The Introduction and Guide were used at the three institutes. Generally, the manual was well received, though many constructive criticisms were received from institute participants. The utility of the Guide, however, was brought into serious question and, following discussions with OE, it was formally eliminated from the project on October 18, 1968.

Further revision of the manual commenced shortly after the completion of the institutes and incorporated many suggestions from a variety of sources: institute directors, instructors, and attendees; readers; staff personnel of operational centers; and selected institute attendees from various types of organizations (e.g., State education departments, local centers, Regional Educational Laboratories, and Research Coordinating Units), who were asked to review the manual in depth. The revised manual was submitted to OE on February 24, 1969, for review and comment, and it was approved with changes on March 10. With the concurrence of OE, the manuscript was submitted by SDC to several commercial publishers; Tinnon-Brown of Los Angeles, accepted the work for publication. It is anticipated that it will be available in published form by mid-July, 1969.

VII. INSTITUTE EVALUATION

As stated in the initial announcements from OE, the summer institutes were to be held for educators interested in learning more about library and information processing operations. Traineeships were open to personnel from local school districts, State Education Departments, Regional Laboratories, ERIC



^{*}The initial edition used at the institutes was entitled Reference Manual for Educational Information Service Centers.

Clearinghouses, and educational materials centers, and—as space permitted—personnel from colleges and universities. The stated curriculum covered the areas of Sources, Acquisitions, Organization, Reference, and Dissemination. Of the five institutes originally scheduled, the following three were held:

School of Library Service University of California, Los Angeles Los Angeles, California

> August 4-9, 1968 Dr. Lorraine Mathies, Director

Division of Librarianship Emory University Atlanta, Georgia

> August 18-23, 1968 A. Venable Lawson, Director

School of Library Science Kent State University Kent, Ohio

> August 25-30, 1968 Dr. Ivan Kaldor, Director

SDC's function in connection with the institutes was to:

- (1) Observe their conduct;
- (2) Evaluate their effectiveness;
- (3) Assess the effectiveness and suitability for future institutes of the SDC- and other contractor-generated products used at the institutes;
- (4) Make recommendations for future institutes and develop revised curricula.

A. Evaluation Procedures

SDC established the following objectives for its evaluation effort: (1) to observe each institute and record the manner in which it was planned and conducted; (2) to identify the elements that either contributed to the strengths or weaknesses of the institutes; (3) to solicit the opinions and reactions of the institute participants—directors, instructors, and attendees; and (4) to draw conclusions on how the experiences of these three institutes could be applied to the development of future institutes. The task of assessing the effectiveness of contractor—generated materials used at the institutes



was treated as a part of this total evaluation. (It is important to note, at the outset, that these objectives were framed in terms of studying the institutes themselves, rather than in terms of determining their long-range effectiveness in increasing the expertise of the attendees.)

The SDC study team gathered information during the planning, conduct, and post-institute review phases of the institutes:

(1) Pre-Institute Planning.

SDC attended the pre-institute director's meeting at OE on June 6, 1968. Several other informal discussions were held with OE officials and the directors prior to the institutes. The proposals of the institutions hosting the programs were made available for review, and copies of attendee applications for each institute were studied.

(2) Attendance at Institutes.

All members of the SDC team attended the first institute; the team was divided for attendance at the remaining two institutes. They did not participate in the technical sessions, but attended all of them as observers. They met and talked informally with directors, instructors, and attendees during the institutes.

The team developed a series of forms that they used as guides for their observations. These included: a general institute report outline; a form that was used as a guide in interviewing institute directors; and session forms, one for each instructional block, whether lecture, seminar, small-group discussion, or workshop.

On the last day of each institute, the study team interviewed the director to gain his first impressions on the institute's success and problems. Whenever possible, the instructors were also interviewed.

(3) Post-Institute Review.

The post-institute reports to OE, available from two directors, were reviewed, as were the written evaluations of the attendees of two institutes. A post-institute meeting for directors was sponsored by SDC and held at OE on September 6, 1968.

The descriptions and evaluations of the institutes presented in the following section are based primarily on SDC's observations; the opinions of the directors and attendees, as either discussed with SDC team members or stated in writing, are also represented.



B. Institute Descriptions and Evaluations

Each institute is described in this report indirectly through comparisons with others, or is referred to individually as institute A, B, or C. Although location may have had some effects on the institutes, the identity of the host institutions is not believed to be crucial to the intent of this report. The SDC study team was not to evaluate the host institutions; rather, SDC was to study and draw upon the experience of each institute in order to make recommendations for future training programs.

The first two of the following four sections describe and evaluate the planning of the institutes; the last two sections describe and evaluate their conduct.

1. Report on the Planning of the Institutes

In observing the planning of the institutes, SDC concentrated on the activities related to coordination, publicity, applications and pre-institute correspondence, program development, and on the budget and time available for the institutes.

Coordination. Coordination between institute directors and OE, and among directors, occurred at two stages. The OE-prepared RFP to accredited library schools and promotional items served as the common basis for the initial planning of the institutes; the June 6 meeting at OE, the primary purpose of of which was to clarify budget concerns due to the change in OE Bureau sponsorship, provided an opportunity for general guidelines on attendee selection and materials to be presented. Beyond this, the institutes developed independent of each other.

Publicity. A one-page promotion sheet was issued nationally through OE to the OE Regional Offices, the State Superintendents of Public Instruction, the Regional Laboratories, and the 200 largest school districts in the country. In addition, an announcement was printed in the May 1968 issue of PACE Report. The directors provided follow-up publicity in their regions through their professional channels and to the organizations suggested by OE, such as those listed in the PACESETTER and other Federally-funded groups.

Applications and Pre-Institute Correspondence. The same application form was used by each of the three institutes. Attendees were invited to select the institute of their choice. (Those selecting the two subsequently cancelled institutes were shifted to available spaces in one of the other institutes.) The deadline for submission of applications was extended several weeks in order to approach the goal of 30 attendees per institute. The original selection criteria, as presented in the RFP, provided for the acceptance of personnel generally not prepared in librarianship who were involved daily in the reference service and information handling service at educational information centers. These criteria, however, were broadened to include non-center personnel at all three institutes.



The figures below represent the numbers of applicants at each of the three institutes.

	Institute		
	A	В	C
Applicants	27	36	30
Attendees	24	. 29	24

Notifications of acceptance were either mailed or telephoned by the directors. At least one letter was sent to every attendee presenting such information as location of his particular institute, its setting, the local climate, housing information, and the general schedule. One director also included a roster of expected participants—both staff and attendees.

Program Development. The manner in which each program was developed internally, i.e., within each institute, differed from director to director. Director A developed the course outline himself and assigned topics to about ten instructional staff members, who worked independently from there; Director B met with a staff of two to develop the outline, and the staff members together were responsible for the coordination and specific content; Director C used a combined approach of assigning topics and working with a staff of about ten on their presentations.

Budget and Time. The budget is mentioned here for the purpose of noting that problems did occur and some time delay was experienced because of the change in sponsoring Bureaus within OE. The planning time for each institute varied from the time of budget acceptance in June, to the actual institute start date. One director reported only six weeks for planning due to budget difficulties.

2. Evaluation of the Institute Planning

The planning for the 1968 summer institutes was made difficult by the fact that these were the first institutes of their kind intended for a particular audience, whose needs and identity were, at that time, largely unknown. This fact accounts for many of the problems discussed below and provides a basis for understanding the uniqueness of the first year's institutes.

Coordination. The directors indicated that more coordination both with OE and among themselves would have been helpful. The SDC study team concurs, to the extent that the directors could have benefited from discussing with others their understanding of the educational information center community, and relating this understanding to planning for curriculum—content emphasis and level. It is recognized, however, that independent planning would necessarily have proceeded from this basis, and three unique institutes would still have resulted.



Publicity. The problem of identifying the recipients of future mailings and announcements will be greatly alleviated by the availability of the Directory of Educational Information Centers. Therefore, the primary problem will be that of preparing publicity that is clear in its statements of objectives and intended audience. The actual content of the institutes should be well defined, rather than described in terms which may have different meanings to different readers. For example, "Organization" as used in the announcements was interpreted by some to mean the processing of materials, whereas others felt it meant the administration of a center. Several attendees indicated thay had to inquire about the meaning of the five terms (sources, acquisitions, organization, reference, dissemination) used in order to understand the purpose of the institutes.

Applications and Pre-Institute Correspondence. The directors indicated that the completed applications did not provide them with sufficient information about the attendees. SDC agrees that the general phrasing of the application allowed excessive latitude in the applicants' responses. This was particularly true in terms of questions 11 and 12, which asked for descriptions of the employing organizations and the individual's activities and duties. Had these questions been more structured, the directors could have used the information to obtain a better sense of the attendees' areas of concerns. Phrases such as "administer or supervise information dissemination program," or "am secretary to," for example, are of little use; and job titles are no more helpful in their indication of responsibilities. It is possible that given more time between the selection of attendees and the actual opening dates of the institutes, more precise information could have been obtained in follow-up correspondence.

Program Development. The methods employed by the directors in the development of their programs were, of course, a matter of individual prerogative. However, the cohesiveness of any program is dependent upon the director or some member(s) of the staff providing continuity throughout the program. This is, in part, the distinction between a conference atmosphere and a training situation. This will be discussed later in terms of the effect the differences in program development had on the actual conduct of the institutes. In terms of the planning stage only, it is recognized that some of the communication problems between directors and staff members were unique to individual institutes because of special circumstances.

Budget and Time. The directors indicated that at least three months (from the time of budget approval) was needed for the adequate planning of an institute. Time for matters of local publicity and communication with staff and attendees was particularly urgent this first year.

ERIC

Summary Evaluation of Institute Planning. Aside from those areas which were primarily "first-year problems," the planning questions to be answered revolve around attendee selection and curriculum design. The directors were inclined to believe that given adequate time this relationship could be resolved by individual institutes. SDC believes that a curriculum can be worked out on the basis of meeting the needs of at least a segment of the potential population (e.g., new center personnel with a need to be oriented to the total operation of a center), and the attendees should then be selected on the basis of their being in positions, or working toward positions, which relate to the planned curriculum.

3. Report on the Conduct of the Institutes

In reporting and evaluating the conduct of the institutes, SDC concentrated on the following categories: attendees and attendance; instructional staffs; class formats and schedules; curricula; and materials.

Attendees and Attendance. As noted earlier, the criteria for selection were exended by the directors to include non-center personnel—"non-center" in terms of the specific sponsoring agencies mentioned in the original announcement. The tabular breakdown in Figure 1 illustrates the principal characteristics of the attendees that contributed to group diversity.

The attendance of the attendees throughout each institute varied from session to session in two institutes, and not all in one. The "dropout" rate was small (one or two per institute); and the "delinquent" rate became significant (five or more attendees missing) usually during evening sessions and the final day of each institute.

Instructional Staffs. The instructional staff (aside from the directors) varied significantly among institutes in terms of numbers and backgrounds. Figure 2 illustrates these differences.

The availability of staff members varied from institute to institute: at one, every staff member was available throughout the day for individual consultations, and was otherwise involved in teaching; the other extreme was represented by one in which the majority of lecturers left after the questioning period following their presentations.

Class Formats and Schedules. Each institute opened with an orientation or welcome session. The opening sessions at two provided an opportunity for the attendees to prepare a statement on their objectives in attending the institute, and problems they would like discussed. The opening session at the third institute was a key-note address by one of the instructional staff members. Two institutes sponsored evening social events. The closing sessions varied: Institute A featured a key-note address; B, an oral evaluation; and C, a general summation session.



	Inst	titute Attend	ees
	A (29)	B (24)	C (24)
Degrees			
Doctorate Education Library Science Other	2	1 1 1	1
Master Education Library Science Other	9 2 5	8 5 2	7 4 3
Education Library Science Other High School	3 1 4 3	1 1 2 3	2 2 4 1
Time in Present Job			
0-3 months 4-6 months 7-11 months 1 year 2 years 3 or more years	5 3 4 8 5 4	4 3 2 7 5 3	2 2 5 5 3 7
Parent Organizations			
School Districts Title III Projects	3 2	4 3	3 5
Regional Educational Laboratories	3	5	4
State Departments of Education Research Coordinating Units Colleges or Universities ERIC Clearinghouses Research and Development Cente	5 5 4 2 ers 1	4 4 4	5 5 3 1
Instructional Materials Center Vocational, Junior or Communic Colleges Professional Organizations	rs 2	1	1

Figure 1. Principal Characteristics of Attendees

Numbers of Instructional Staff at Each Institute

	A	В	С	
	(2)	(9)	(8)	
Part Time*	-	9	2	
Full Time **	2	-	2	
Number from Host Institution	-	6	4	
Backgrounds				
Librarians/Information				
Specialists	2	5	6	
Educators (University)	-	1	2	
Clearinghouse or Center				
Personnel	-	3	-	

Figure 2. Characteristics of the Instructional Staff



^{*}Part Time: Instructors who were used as group discussion leaders or were responsible for only one presentation.

^{**} Full Time: Instructors who were availabe throughout the week and were responsible for more than one session.

The daily schedules were similar among institutes in that each used continuous blocks of time for each topic or combined topics. These blocks of time, or sessions, ranged from one-helf hour to 2 1/2 hours; some tipics were given more than one session. The types of sessions used are shown in Figure 3. It can be seen that each institute used combinations of instructional methods, but the principal one used was the lecture method. Coffee breaks were provided at each institute, during which time informal conversations among participants and staff were possible.

The coordination among staff and with the directors during the institutes ranged from close and regular consultation to little or no communication. At one institute the staff attended each other's sessions regularly; at another, occasionally; at a third, not at all.

Curricula. The topics covered at each institute are shown in Figure 4. The titles are those assigned by the individual institutes. The basic areas of acquisition, reference, national information systems, educational resources, cataloging, classification, indexing and abstracting were covered at each. Individual institutes differed in the following areas:

Institute A added an automation session upon attendees' request

Institute B added material on audio-visual aids and equipment

Institute C added an emphasis on ERIC clearinghouses

At least on workshop/assignment was given at each institute. An assignment used at one institute was an indexing and abstracting problem; the assignment used at the other two was on the use of ERIC tools.

Materials. Each institute provided its participants with several OE-supplied materials: the products of three OE contractors; ERIC products; and brochures on national information resources. The manner in which each was introduced, distributed, and used is discussed below.

- (1) Contractor-generated products.
 - Guide to Reference Manual for Educational Information Service Centers. (SDC)

The Guide was intended for staff use only; it was used by small group discussion leaders at one institute.

Reference Manual for Educational Information Service Centers. (SDC)

The Manual was introduced at each institute as the text for the week. General reading was suggested at two institutes and it was referenced by the staff on occasion throughout the week. At the third institute, specific reading assignments were made and it was used regularly.



	Ins	stitutes	
Class Format	A	В	С
Full Group			
Lecture/Question and			
Answer Period	13 hours	10 hours	7 hours
Lecture/Demonstration	5 hours	9 hours	4 hours
Laboratory or Workshop	1 hour	1/2 hour	4 hours
Seminar	4 hours		7 hours
Small Groups			
Lecture/Discussion		5 hours	
Laboratory/Workshop		2 hours	
Visits (Field Trips)	2 hours		
	*********	and Colors	**********
Total	25 hours	26 1/2	22 hours
		hours	

Figure 3. Types of Institute Sessions

TNS#T#UTE A	INSTITUTE B	INSTITUTE C
The Role of Information Service in the Field of	Information: USA	Educational Information Services
ouo	Educational Information	ERIC and ERIC Tools
An Overview of Educational Information Centers	Systems and Services	Libraries and Information Centers
Interrelationships of Libraries and Information	Problems of Educational	Acquisition and Organization of
Centers min tangetions Information Services Center	Operations: (I) Basic Con-	Rewinar: Identification, selec-
Development of an Acquisitions Policy and Process-	siderations in Establishing a Center (II) Processing	tion, acquisition, and organiza- tion of educational information
Ing Procedures The Organization of Resources	(III) Dissemination Tecn- niques and Policies in	Center Operations
Indexing Systems in Use	Centers (IV) Housing,	Dissemination Activities
ERIC Tools: Their Capabilities and Use	0	Seminar: Assignment to develop
Indexing and Abstracting	Classification of Knowledge	individual's center
The Dissemination of Information		Reference Service
Defining of the Reference Problem	Records of Mowledge	Coonerstive Services
The Reference Literature of Education	Indexing in Information Centers	Seminar: Reference services.
Overview of an Instructional Materials Center	Abstracting in Information	policies on literature searches,
The Acquisition, Organization, and Use of Non-	Centers	copyright restrictions, etc.
Book Instructional Materials	Selection and Acquisition	Evaluation
The Acquisition, Organization, and Use of	of Materials for Centers	Summary
The Operation of an Educational Information Ser-	Informations	
vice Center	Reference Activities of	
The Information Center and the Educational	Centers	
The Resource Center in the Instructional Process	The Center and the Educa-	
General Summary: Evaluation of Institute, Rec-		

• Handbook of Information Sources in Education and the Behavioral Sciences. (American Institutes for Research)

The <u>Handbook</u> was introduced as being of general interest. It was distributed early in the week at two institutes, and on the last day of another. It was referenced very little throughout the week at any institute.

A Guide to Information Tools, Methods, and Resources in Science and Engineering. (Herner and Company)

The <u>Guide</u> was distributed early in the week with little introduction at two of the institutes. It was made suggested reading at a third.

(2) Brochures on national information resources (CFSTI; NLM; SIE; NASA; NRC; ERIC)

These were either distributed or made available on a "pick-up" table. No special introduction or use was made of any.

(3) ERIC Products (RIE; PACESETTERS; Thesaurus; Research Reports; Annual Index)

These were used in workshop sessions at two institutes; their use was demonstrated at a third.

In addition, two of the institutes provided the following materials:

- Institute A: . Technical Information Center Administration, Vol. 3
 Edited by Arthur W. Elias.
 - . Audio-visual equipment manufacturers' brochure
 - . Book publishers' brochures
 - . Texts or outlines of each lecture
 - . Bibliographies prepared by instructors.

Institute B: . SRIS Quarterly, Winter 1967.

- . IBM manual, Index Organization for Informational Retrieval.
- ERIC clearinghouse materials (e.g., resume form guidelines for abstracting, newsletters)
- . Instructor-prepared materials (e.g., reading list and course outlines for acquisitions; form and layout designs used in an educational materials center)
- . 3M promotional items
- On display were a 3M 400 Reader-Printer and an Atlantic Reader



4. Evaluation of the Conduct of the Institutes

This evaluation is based on three sources: (1) directors' reactions; (2) attendees' reactions; and (3) SDC team members' reactions, drawing heavily upon inter-institute comparisons.

Director Reactions. The directors indicated in varying degrees that they felt the institutes to be successful in spite of the problem posed by the heterogeneity of the attendee groups. They reported satisfaction with the knowledge that the material presented was needed by most of the attendees, and that the institutes provided a means for contacts to be made among attendees.

One director stated that any future institute would be conducted by him along the same lines; another indicated that certain changes would be made-particularly with respect to involving attendees in the discussions; a third felt that, through more communication with the attendees prior to the institutes, a more relevant program could be developed for their needs.

Attendee Reaction. The overall reactions as reported by the attendees were generally favorable; those of one institute were more favorable than were those at the other two. Judgements on the relevance of certain parts of the curriculum to their needs were varied at each institute: a significant number indicated that the subjects dealing with the processing of materials were over emphasized and least applicable to their needs; the lectures on national information systems and resources were cited as the most useful. There were mixed reactions to the appropriateness of the level of the presentations. They often mentioned their awareness of the difficulty in meeting the needs of the various attendees. In general, they had no suggestions for major additions to the curriculum; if anything, they indicated there was too much material to be covered.

Two institute groups indicated that they believed there should have been more group discussions for the purpose of exchanging information about their centers' purposes, procedures, and problems. Attendees at the third institute (which maintained a high level of group participation throughout) were highly favorable in their comments.

The attendees' comments were positive toward all the products, but were often qualified by, "it looks good; but I didn't have a chance to read it thoroughly."

SDC Evaluation.

(1) Overall Effectiveness

Each institute was working with the same basic problems: a heavy schedule of topics to cover in five days, and the question of how best to present material to such a diversified group. It is the opinion of the SDC study



team that one institute was more effective in resolving these problems than the other two. This particular institute used only two staff members who worked as a team in preparing and presenting the material (with one outside subject specialist brought in to present additional material). These two staff members were flexible throughout the week in meeting the enthusiasm of the group for one topic rather than another, and in providing for group discussions.

The larger number of staff members at the other institutes made this type of coordination and flexibility difficult. Without the staffs' being involved throughout the week, they could not come to understand the educational information community the attendees represented, or the appropriate levels for presenting material to that particular group. As a result, in-class group discussions and exchange were minimal.

(2) Curriculum

In terms of the curriculum, the SDC study team agrees that there was much to be covered in five days. There was some difficulty in "selling" the subjects on cataloging and classification to these groups. Many—those from non-book—oriented centers in particular—questioned the relevance of the book emphasis. Cataloging and classification were presented as separate subjects, and their individual importance was not integrated into a total presentation on how to organize a center's materials for effective retrieval. The relationships between cataloging, indexing, and classification were not drawn, and the attendees had be make the translation in relations to their centers' organizational needs. Some attendees could not do this.

On the other hand, a great deal of interest was displayed in the presentations on national information systems and resources. There was much interest in the organization of ERIC, and in the use of its products; interest in its internal operations (clearinghouse responsibilities in monitoring, screening, and evaluating) was especially high. The clearinghouse attendees sucessfully became resource people for these discussions.

One area that was felt to be slighted was that of establishing a philosophy of information dissemination in education; i.e., why should there be educational information centers and what are reasonable expectations for an information dissemination program in a program for change? No substantive discussions were held on the relationships between, and differences among the parent organizations of which the centers represented were a part; i.e., what are Research Coordinating Units, Regional Educational Laboratories, and Instructional Materials Centers? These programs are too new to assume that their purposes and programs are known to all individuals working in the field of education.



(3) Scheduling and Class Formats

Lengthy lecture sessions were often carried on for an entire day. In the future, it would be better to intersperse varying types of class formats throughout the day in order to maintain the group's interest. Formal evening sessions* should be used sparingly, and more for small group projects and/or individual assignments. Each topic to be covered should be carefully reviewed for the method of presentation that is most suitable; workshop experiences should be planned for whenever possible.

(4) Materials

Three categories of materials were used at the institutes: (1) reading materials (for the week); (2) hand-outs for later use; ** and (3) aids for demonstrations and/or laboratory work. The hand-outs (pamphlets, brochures) varied in the degree to which they could have been useful in the sessions; several (the ERIC brochures; pamphlets on CFSTI, SIE, etc.) could have been assigned for reading in preparation for the lectures on these resources, or referenced in passing. The ERIC products were, on the whole, well used in demonstration and laboratory sessions.

Since the contractor-generated products were not well incorporated into the institutes, primarily because of time problems, the feedback on these products is limited.

- Guide to Reference Manual for Educational Information Service Centers (SDC)

 This product was limited to the staff (and was dropped from the project).
- Reference Manual for Educational Information Service Centers (SDC)
 This product was suitable as background reading, and as a departure point for discussions and more extensive "how-to-do-it" sessions. It cannot stand alone as a text for the institute, but would be particularly useful as assigned pre-institute reading for staff and attendees.
- A Guide to Information Tools, Methods, and Resources in Science and Engineering (Herner and Company)
 Although the title of this product may mislead members of the educational information community, it should be introduced to them both as a reference tool and for background reading to the institute discussions on national



^{*}Two institutes were scheduled the weeks of the national political conventions; this created a "conflict of interest" for many participants.

^{**}Mention is warranted that attendees at one institute were deluged with handout materials and the other products. It might be well for attendees to be
advised to bring an extra suitcase for carrying these materials, or provision
should be made at each institute to mail them.

systems and resources. Its problem-solving approach to categorizing information resources can be useful for the beginner in sorting out and and understanding the information world.

Handbook of Information Sources in Education and the Behavioral Sciences (American Institute for Research)
This tool is also useful as a reference tool and background reading for discussions on educational resources.

SDC agrees with the directors that there is no need for a test as such These products and selected readings in other areas would be useful in a bibliography of pre-institute reading assignments.

C. Conclusions and Recommendations

It is the opinion of the SDC study team that all three of the 1968 institutes succeeded in the following areas: (1) providing attendees with an overview of operational areas in centers; and (2) providing the attendees with the opportunity for making contacts (formally or informally) with colleagues and for exchanging ideas. Future institutes, of this type, can continue to achieve these objectives more easily by building on the experiences of these first institutes. The general areas discussed below have been identified as the principal elements in the institute program:

- (1) Publicity. Objectives, course content, and intended audience should be clearly stated. The 1968 institutes were comprehensive orientation-type institutes which serve to introduce personnel to the broad operational areas of the educational information center rather than to train personnel in specific skill areas. The primary target populations for such orientation-type institutes should be those individuals who are new to the center (regardless of their educational background), and those who are planning new centers.
- (2) Selection of Attendees. The general criteria suggested above will reduce the heterogeneity in attendee groups, but will not totally eliminate it. A certain degree of diversity in representation of centers (e.g., Title III centers; State Departments of Education) should, in fact, be encouraged. The commonality of needs within such a group will be their newness to the educational information center setting. Individuals with library or information science training should be used as resource people for the topics with which they will already be familiar.

As space permits, these criteria can be expanded to include individuals peripherally involved in information center activities. However, it should be made clear to these individuals that major changes in the curriculum cannot be made to satisfy their unique interests.



- (3) Time and Coordination. Adequate time should be allowed for directors to communicate with their staffs and attendees. SDC concurs with the directors' opinion that three months planning time is needed. This will help to ensure an understanding among all participants of the institute objectives.
- (4) Instructional Staff. Decisions on the importance of providing for formal attendee participation should be made. The difficulty in providing for full participation with groups of 30 suggests the need for careful planning.
 - Smaller numbers of instructional staff (two or three) provide a well-integrated program with continuity, which appears to foster a group identity and high sense of purpose.
 - . The introductory level of material presented and the variety of areas covered can probably be handled as well by generalists as by subject-matter specialists. Specialists should be drawn in for a few selected topics as needed.
 - . Careful attention should be given to the method of presentation for each area; whenever appropriate, "hands-on" experiences should be provided. In areas where there is less of a foundation in specific subject matter (e.g., user-relations; center services), the seminar approach should be employed. Individuals within the attendee group can be identified and used as resource people, particularly for small group projects.
- (5) <u>Curricula</u>. The following general topic areas and suggested approaches are offered for future orientation-type institutes. This outline is, in part, a composite of the approach used at all institutes on a given topic and, in other parts, is suggested new material or changes in emphasis.
 - Overview of National Information Systems and Resources
 An introduction to specific resources of the "information world," with a special emphasis on drawing parallels and making distinctions between: types of sponsoring groups (professional societies; government); various names used (document distribution centers; information analysis centers; special libraries); and functions (indexing/abstracting; storage).
 - A Framework and Philosophy for the Educational Information Center Community

 An overview of purposes and programs of the various parent

organizations sponsoring information centers within, and as adjuncts to, the school system (e.g., RCU's; REL's; IMC's; Title III projects); the role of information services in these settings—commonalities and differences, and relations to



each other and to ERIC; reasonable expectations for a dissemination of information program in these settings, and for their particular user groups; the educator-user; user-center relations and user studies.

- Acquisition of Materials The role of centers in acquiring local materials; the center's role in inputting to ERIC; selection tools; searching; "gaps of knowledge" in the literature.
- The Organization of Materials

 Building a case for the importance of organizing material for future retrieval; handling non-book materials; conventional and non-conventional indexing systems.
- Educational Reference Tools
 Use of ERIC products; quick reference; literature searches.
- Center Facilities and Equipment
 Storage, microform, and reproduction equipment; center layout designs.
- Dissemination Services
 The objectives and design of procedures for services, such as publications, SDI, and journal tables of contents.
- (6) Summary. Given a continued growth in the educational information center community, and even a minimal turnover rate in personnel of currently existing centers, the comprehensive, orientation—type institute will continue to serve a vital function. It will assist the community in developing a core of personnel who have some specific understanding of a center's total operation, and a general understanding of the world of information. However, a core of personnel is also developing on the basis of on—the—job experiences. Some of these people will soon be claiming five years experience in the educational information center and for them the orientation—type institute will not continue to be useful.

Therefore, SDC concludes its recommendations by suggesting that OE consider developing a new institute program for these personnel. The purpose of such a program would be to upgrade the proficiency of operational personnel in specific skill areas, and to assist administrators in solving center management problems.

The need for such a program is predicated on the assumption that many of these individuals have developed their skills on the job, without benefit of specific training or course work. They may, in fact, be performing adequately. However, certain skill areas can be identified for which some training would be helpful; e.g., indexing and abstracting. The development of a series of three or five-day institutes in several areas would necessitate a study of the following areas: (1) identification of skills requirements in the

ERIC

educational information centers; (2) a testing of the program concept with center personnel; and (3) determination of what institutions or organizations have the staff resources and facilities for such a program.



APPENDIX

31

The tables shown in this appendix represent selected data from the <u>Directory</u> questionnaires. These statistics will differ slightly from those represented in the compiled <u>Directory</u> because the final entries reflect changes indicated by the centers upon final review. The questionnaire sections from which these tabulations were made are given below:

III. SERVICES

Please check below the publications produced and the information services produced by your Center.

A. Publications:

Abstracts or indexes bibliographies research reviews	reports current announcements directories	periodicals books specifications
newsletters		
Other (specify)		

B. Services

Reference Bibliography compilation Preparation of reviews of research and development material	Advisory or consulting services Literature searching services Referral services Translation services
Abstract preparation	Reproduction services
Index preparation	Automated Data processing re-
Direct loan	lated services
Inter library loan	
Other (specify)	

VI. HOLDINGS

A. Please check the types and numbers of material in your Center: (Including published, unpublished, hard copy and microfiche.)

Books (hard cover and paperback)	Periodical Titles	Reports
1-1,000	1-1,000	1-1,000
1,001-5,000	1,001-5,000	1,001-5000
5,001-10,000	5,001-10,000	5,001-10,000
10,001-25,000	10,001-25,000	10,001-25,000
25,001-50,000	25,001-50,000	25,001-50,000
Over 50,000	Over 50,000	Over 50,000



Reference volumes (encyclopedias, annuals, indexe	s, etc.)
Reprints of journal articles	
Other (specify)	

- B. Check for any of the following materials made available through the ERIC (Educational Resources Information Center) system of the U.S. Office of Education included in your holdings?
 - 1. ERIC indexes or announcement bulletins

Research in Education (monthly)

Research in Education Annual Index -- 1967. Reports.

Research in Education Annual Index -- 1967. Projects.

Office of Education Research Reports, 1956-65. Resume Volume.

Office of Education Research Reports, 1956-65. Index Volume.

Pacesetters in Innovation, 1966

Pacesetters in Innovation, 1967

ERIC Catalog of Selected Documents on the Disadvantaged. Number and Author Index

ERIC Catalog of Selected Documents on the Disadvantaged. Subject Index

Manpower Volume -- Manpower Research Projects

2. Other ERIC reference or information tools

Thesaurus of ERIC Descriptors

Newsletters from ERIC clearinghouses. If you checked, how many do you receive?

Review papers produced by ERIC clearinghouses

3. Have you ordered any reports from the ERIC Document Reproduction Service

Yes No

If YES, what documents have you ordered?

Individual reports purchased from time to time. Total no.

Standing order for all reports available each month through
Research in Education

All documents in the collection of U.S. Office of Education Reports, 1956-65.

All documents in the Collection of Selected Documents on the Disadvantaged.

All documents in the 1966 Collection of Pacesetters in Innovation.

All documents in the 1967 Collection of Pacesetters in Innovation.



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The abbreviations indicated below are used in the following charts to represent the types of centers; the total number* of centers in each group is also provided:

III	Title III ESEA Projects	317
RCU	Research Coordinating Units	31
REL	Regional Educational Laboratories	7
OE Reg.	Office of Education Regional Offices	3
IMC	Instructional Materials Centers	11
R&D	Research and Development Centers	3
State Dept.	State Departments of Education	13
** Others		12



^{*}These figures represent the number of center for each category included in the <u>Directory</u>; unclear and no-response items on the questionnaires were not included in the following tabulations; therefore, the totals for each category will not necessarily match those given above.

^{**} The "Other" category is not included in the following tabulations.

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